Exercise Guide for

OM250

Agency Funding Approval

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Exercise 1.1 – Using Free Search

<div style="border:1px solid black;">

PO13

</div>

Scenario

You need to find information about a specific cost center, order and fund and the positions that are associated with each.

Instructions – Search for Cost Center

Use free form to search for cost center 1721170000.

1. Type **PO13** in the Command field on the Easy Access screen.

2. Click or press Enter.

3. Click in the Position field.

4. Click the matchcode in the Position field. The Object Select pop-up screen displays.

   NOTE: If Free Search is not displayed as your search option, use the icon (circled in graphic below) and select Free search from the drop-down menu.
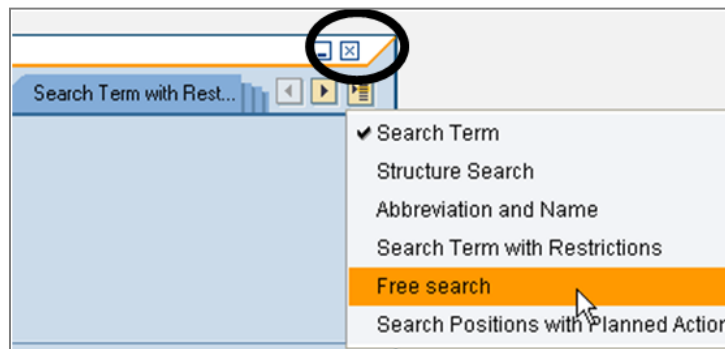
5. Select the binoculars icon. A pop-up window for cell content displays.

6. Type **Cost Center**.

7. Click the green check mark.

8. Close the pop-up window.

9. Select the **value selection box** beside cost center. The box on the right side of the screen changes to allow you to type in the value for the data for which you are searching (in this case, the Cost Center).

10. Click in the **Value** field on the right side window.

11. Type **1721170000**.

12. Click the Hit List button. Observe a message displays on the task bar indicating the number of hits. Write that number in the answer to Question 1 below.

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	Sub Area:	Organizational Management

13. Click the glasses icon (the one next to the Hit List button) to view the hits. You can see the position numbers that are related to the cost center. Close the hit list. You are returned to the HR Object Selection screen.

14. Click the green check mark. The pop-up box displays the number of entries found. A list of the positions displays except in this view there is additional data that can be viewed. For example, you can see at a glance that the Organizational Unit Abbreviation code is the same for all of the positions. Keep in mind that the Organizational Unit Abbreviation is not the Org Unit code. The Org Unit code begins with the number 2 and is typically 8 digits.

15. Select the first entry and click the green check mark.

16. Highlight the Relationships infotype.

17. Click the **Overview** icon.

18. Look for the Org Unit to which the first position belongs and answer Question 2 below (code for O = org unit).

Questions

Question 1

How many positions show on your hit list?

A

- -

Question 2

To which Organizational Unit does the first position belong? Since they all belong to the same Org Unit, by identifying the first one, then you know that this same Org Unit is the one the other positions also belong.

A

- -

Question 3

True or False: The position you selected is the Agency Approver for 20000040?

A

- -

- -

Instructions – Search for Order

Use free form to search for Order 100000000151.

1. Type **PO13** in the Command field on the Easy Access screen.

2. Click or press Enter.

3. Click in the Position field.

4. Click the matchcode in the Position field. The Object Select pop-up screen displays.

5. Select the binoculars icon. A pop-up window for cell content displays.

6. Type **Order**.

7. Click the green check mark.

8. Close the pop-up window.

9. Select the **value selection box** beside order number. The box on the right side of the screen changes to allow you to type in the value for the data for which you are searching (in this case, Order)

10. Click the **Multiple selection** button as illustrated below:

11. If needed, click the Select Single Values tab.

12. Click in the first row and enter: **100000000151** (**NOTE:** There are 8 zeros in the number).

13. Click in the second row and enter: **100000000154** (**NOTE:** There are 8 zeros in the number).

14. Click the Copy button (looks like the Execute button).

15. Observe the yellow arrow now has a green mark under it to indicate that more than one entry is included in the field.

16. Click the green check mark. The pop-up screen displays the number of entries found.

17. Click the title of the Org Unit Abbreviation column so that it sorts by number.

18. You can see at a glance whether or not they all belong to the same Org Unit. To see which specific Or Unit a position belongs to, select the first entry and click the green check mark.

19. Double-click the Technology Support Specialist position.

20. Highlight the Relationships infotype.

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21. Click the **Overview** icon and review the various relationships associated with the position.

Questions

Question 1

How many positions display on your hit list?

A

Question 2

Do they all belong to the same organizational unit?

A

Question 3

From what job number was the position created?

A

Question 4

Is the Technology Support Specialist position an Approver position?
A

Instructions – Search for Fund

Using information that you learned in previous steps, use the free form to search for fund 301250001.

Question 1

How many positions display on your hit list?

A

Question 2

Do they all belong to the same organizational unit?

A

This exercise is complete.

Exercise 2.1 – Salary Adjustment | Workflow

Scenario

The first of next month the Civil War Roster Branch Supervisor for the History Civil War division of the Department of Cultural Resources, George Crumley, will receive a Salary Adjustment due to assuming Lead worker responsibilities. His salary will change from $40,150 to $51,500, yet remain within pay grade GR72.

You have received a Personnel Change Request (PCR) in your inbox, requesting approval and a change in the budget to support the salary change.

Instructions

1. If necessary log onto SAP using the **Funding Approver** user id and password.

2. From the Easy Access screen, click SAP Business Workplace.

3. Click the node beside Inbox ▷ Inbox to expand it.

4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.

5. Select the PCR you want to review.

6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.

7. Click Services for Object to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.

8. Select Attachment List. The Services: Attachment list pop-up is displayed.

9. Highlight the line item for the note, and select Display (or double click). The Display note pop-up displays with the note title and note information.

10. Click to close the Display note pop-up.

11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

12. Click the back button to return to the Workflow screen.

13. With the applicable PCR still highlighted, click Execute (or double click the PCR line item). The Employee Action Request – Funding screen is displayed.

14. Review the General tab for accuracy.

15. Click the Cost tab and review the current funding information for accuracy. Note that on this screen all of the fields are grayed out; therefore, you cannot make changes.

16. Click Update 1018 [Update 1018]. The Create Cost Distribution screen is displayed. The fields are no longer grayed out thus allowing the Funding Approver to make applicable changes in each of the columns (to change the funding source or split funding, etc.). In this scenario, no changes are needed for those fields.

17. Press Enter. The Budget Distribution pop-up is displayed. This screen allows the Funding Approver to enter the amount budgeted for the position and the reason why the funding was changed.

18. Enter the new date.

19. Press Enter.

20. Enter the following data:

Field	Value
Total Budgeted Amount	$51,500
Action/Reason Code	Select the option for "Position Budgeted Salary Change"

21. Click the green check to close the Budget Distribution pop-up.

22. Click Save at the Cost Distribution screen.

23. The Decision Step in Workflow is displayed. Observe that the Funding Approver can approve, cancel and keep the PCR in his or her files, or reject it and send it back to the Initiator.

24. Click Approve Change.

25. Review the Workflow Tracker to view where the PCR request is routed to next.

Questions

Question 1

T or F: Placement of the wildcard on the search criteria when performing a search determines the search results.

A.

Question 2

What are the primary infotypes used by the Funding Approver?

A.

This exercise is complete.

Exercise 2.2 – Reallocation

Workflow

Scenario

The first of next month, the job for the position of Historical Review Editor for the General History division of the Department of Cultural Resources, will receive a Reallocation due to a reclassification analysis. The BEST Shared Services team has already changed the pay grade on the job from GR70 to GR71, but this results in the salary of Eunice Rivera being below the minimum for the pay grade. The workflow PCR has been submitted by the initiator, and approved by the Agency approver, and is now in your inbox for budget review and approval.

Instructions

1. If necessary log onto SAP using the **Funding Approver** user id and password.

2. From the Easy Access screen, click SAP Business Workplace .

3. Click the node beside Inbox ▷ Inbox to expand it.

4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.

5. Select the PCR you want to review.

6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.

7. Click Services for Object to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.

8. Select Attachment List. The Services: Attachment list pop-up is displayed.

9. Highlight the line item for the note, and select Display (or double click). The Display note pop-up displays with the note title and note information.

10. Click to close the Display note pop-up.

11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

12. Click the back button to return to the Workflow screen.

13. With the applicable PCR still highlighted, click Execute (or double click the PCR line item). The Employee Action Request – Funding screen s.

14. Review the General tab for accuracy.

15. Click the Cost tab and review the current funding information for accuracy. Note that on this screen all of the fields are grayed out; therefore, you cannot make changes.

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16. Click Update 1018 `Update 1018` . The Create Cost Distribution screen is displayed. The fields are no longer grayed out thus allowing the Funding Approver to make applicable changes in each of the columns (to change the funding source or split funding, etc.). In this scenario, no changes are needed for those fields.

17. Press Enter. The Budget Distribution pop-up is displayed. This screen allows the Funding Approver to enter the amount budgeted for the position and the reason why the funding was changed.

18. Enter the new date.

19. Press Enter.

20. Enter the following data:

Field	38
Total Budgeted Amount	38,555
Action/Reason Code	111

21. Click the green check to close the Budget Distribution pop-up.

22. Click Save at the Cost Distribution screen.

23. The Decision Step in Workflow is displayed. Observe that the Funding Approver can approve, cancel and keep the PCR in his or her files, or reject it and send it back to the Initiator.

24. Click Approve Change.

25. Review the Workflow Tracker to view where the PCR request is routed to next.

Questions

Question 1

T or F: Funding Approvers can approve, reject or cancel a PCR.

A.

Question 2

T or F: Budget amounts must be whole dollars.

A.

This exercise is complete.

Exercise 3.1 – Update Cost Center

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PO13

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Scenario

Effective today the Deputy Chief III position has a different cost center. Make the appropriate update to the position to indicate that 1611300000 is the new Cost Center. The budget amount did not change. Before you make the revision, view the infotype first using the Display function.

Instructions

1. Enter transaction code **PO13** in the Command field.

2. Click

3. Enter the Chief Deputy III position number from your data sheet.

4. Select infotype Cost Distribution (IT1018).

5. Select the "All" time period.

6. Use the Display function to view the number of records that are contained on the Infotype. Observe that the Next Record and Previous Record buttons are grayed out.

7. Click the Back button to return to the Maintain Position screen.

8. With the Cost Distribution infotype still highlighted, select the Copy button.

9. Complete the following fields:

Field	Value
Date	Today's date
Cost Center	1611300000

10. Click Enter . The Budget Distribution field displays.

11. Complete the following fields:

Field	Value
Action/Reason code	Use the Matchcode to select the option for "source of position funds change" from the drop down list. Note that you can also make changes to the Total Budgeted Amount field when applicable. It was not necessary in this scenario.

12. Click Continue . You are returned to the Cost Distribution screen.

13. Click Save. A message displays indicating that the previous record will be **delimited** (because we entered a new date).

14. Click Yes. The Maintain Position screen is displayed with a message indicating the record is created.

15. Use the Display function to view records (be sure to select the "All" time period. You can see that the position now has two records associated with the Cost Distribution infotype (because you changed the date to a new date).

16. Click the Back button to return to the Easy Access screen.

Questions

Question 1

T or F: The majority of funding transactions are process because an Initiator created either an OM or PA Workflow?

A.

Question 2

T or F: A Funding Approver access PCRs via his or her Inbox?

A.

This exercise is complete.

Exercise 3.2 – Split Funding

PO13

Scenario

Effective today the Assistant Secretary for EHNR position will be split 70% appropriated fund 161140001 and 30% receipt supported 161140005. Make the appropriate revisions to the position using reason code 110.

Instructions

1. Enter transaction code **PO13** in the Command field.

2. Enter the Assistant Secretary for EHNR position number from your data sheet.

3. Copy infotype Cost Distribution (IT1018).

4. Enter the effective date (today's date).

5. On the first line, change the 100% to 70%.

6. Click on the line below to begin a new line. In this case, only the **Fund** field changed. Enter the CoAr, Cost Center and Order as applicable.

7. On the same line enter:

Field	Value
Pct.	30.00
Fund	161140005

8. Click Enter ✅.

9. Complete the following fields:

Field	Value
Action/Reason code	110

10. Click on the toggle button 🔲 Toggle and change the Budgeted Amount detail lines to whole dollars.

11. Click Continue ✅.

12. Click Save.

13. Click Yes to accept that the previous record will be delimited.

14. Click the Back button to return to the Easy Access screen.

This exercise is complete.

Exercise 3.3 – Revise Budget

PO13

Scenario

Effective today the budget for the Office Assistant V will be $35k instead of the previous amount. Make the appropriate revision to the position using reason code 111.

Instructions

1. Enter transaction code **PO13** in the Command field.

2. Click ✅.

3. Enter the Office Assistant V position number from your data sheet.

4. Copy the Cost Distribution (IT1018).

5. Complete the following fields:

Field	Value
Date	Today's date

6. Press Enter.

7. Complete the following fields:

Field	Value
Total Budgeted Amount	35k
Action/Reason code	111

8. Click Continue and Save.

9. Click Yes at the delimit message.

10. Click the Back Button to return to the Easy Access screen.

Question

Question 1

What result would have been achieved if you had not changed the date in this exercise?

A.

- -

This exercise is complete.

Exercise 3.4 – Correct an Error

PO13

Scenario

You have received documentation that the percentages for the Assistant Secretary for EHNR position were entered incorrectly (Exercise 3.2).

Using the Copy function with the original date, correct the error on the split funding for the position.

Before you make the correction, use the Display function to view the data.

Instructions

1. Enter transaction code **PO13** in the Command field.

2. Enter the Assistant Secretary for EHNR position number from your data sheet.

3. Select infotype Display Budget (9018). Hint: You have to scroll past Cost Distribution to get to Display Budget.

4. Select the Display button and view the number of records that have been entered for the position.

5. Click the Back button to return to the Maintain Position screen.

6. Copy the Cost Distribution infotype.

7. Ensure that the date is the same date as the original entry (today's date).

8. On the first line, change the percentage to 60%.

9. On the second line, change the percentage to 40%.

10. Press or click Enter.

11. On the Budget Distribution pop-up, enter 111 as the reason.

12. If the amounts are not even dollar amounts, use the toggle function to change as applicable.

13. Close the Budget Distribution pop-up and save the infotype.

14. Click Yes when prompted that overlapping records will be deleted.

15. Scroll to the Display Budget infotype and use the Display to view the entries. You can see that because you did not change the date, the previous record was overwritten and the record contains the new correct information. The record contains the same number of entries.

Questions

Question 1

When you use the Copy function, what determines whether history is created or erased?

A.

Question 2

T or F: If an error needs to be corrected, the Pencil button is used to make the correction. Why or Why not?

A.